



Training Process Team Kick-off Working Session

October 30, 2001



Welcome

- Introductions



Service Standards

- Be Worthy of Trust
- Be Courteous
- Deliver Great Products and Services
- Be Efficient



5 Keys of Training

- Training should be:
 - Relevant
 - Interactive
 - Engaging
 - Polished
 - Supported



Ground Rules



Goals of the Workshop

- Pilot the new standard training design & development process
- Apply SFA U's new training methodology to Delivery Systems training
- Plan the Delivery Systems training effort
- Define roles, responsibilities and deliverable timelines
- Utilize standard templates and job aids to outline training design & development activities
- Gather feedback regarding the new training methodology and ease of templates/job aids use



Agenda

Time	Topic
9:00	Introductions
	Explanation of Process
	Overview of Process
	Plan It Overview
	Roles & Responsibilities
	Training Needs Analysis working session
	Audience Analysis
	Performance Analysis
3:30	Closing
4:00	Happy Hour at Cap City Brewery



Training Process Overview Presentation

- Develop
 - Plan It
 - Design It
 - Build It
- Deliver
 - Do It
 - Assess It



Plan It Overview

Major Deliverables Include: Training Needs Analysis, Instructional Design Plan, Project Plan, and Task Order

Phases	Major Deliverables	Task(s)	Roles	
Plan It!	Training Needs Analysis	Conduct Audience Analysis	SFAUPM, ID, SMEr, Urrrr	
		Conduct Performance Analysis	SFAUPM, ID, SMEr, Urrrr	
	Instructional Design Plan	Identify Learning Objectives	ID	
		Identify Content Scope (Content Inventory)	ID, SMEr	
		Determine Delivery Strategy/Instructional Strategy	ID, SFAUPM	
		Identify Logistics Strategy	LC	
	Project Plan	Identify Roles (Role Map)	PS, PPM, SFAUPM, ID	
		Identify Stakeholders	SFAUPM	
		Create Workplan (Tasks, Deliverable Schedule, Check-in Points)	SFAUPM, LC, Production	
		Develop Budget	SFAUPM	
	Task Order	Create, Review and Award Task Order	SFAUPM, COR, PS, PPM	
	Project Management	Kick-off meeting	SFAUMgmt, SFAUPM, PPM, PS	
		Control project work throughout each phase	SFAUPM, PPM	



Role Matrix

	Role	Responsibilities	Time Commitment	How Many/Who?
Leadership	Program Sponsor (PS)	Set strategic direction Approve Business Case Funding control Approve recommendations Sign-off authority		
	SFAU Project Sponsor	Set strategic direction Approve recommendations		
Project Team	Program Project Manager (PPM)	Sponsor support Project promotion Team buy-in Oversee project Review & approve recommendations Sign-off designee Manage SME involvement Control project work throughout each phase		
	SFAU Project Manager	Monitor progress Establish & support project team Review recommendations Negotiate sourcing options		
	Team Lead	Conduct performance analysis Create project plan Create deliverable schedule Manage daily project tasks Identify & review deliverables (facilitator/participant/TOT) Control project work throughout each phase		
	Instructional Designer (ID)	Conduct performance analysis Provide input & direction on the design and development of training materials Develop the Curriculum Plan Determine training delivery strategy Identify & design instructional platform Create Content Outline Identify & build Help/Support processes		



Training Needs Analysis Working Session

- Conduct audience analysis
- Conduct performance analysis



Audience Analysis

- Outlines and identifies user groups and their job activities
- Identifies the following factors:
 - User groups
 - Number of users to train
 - Audience background/Level of Delivery Systems awareness
 - Roles and responsibilities of specific job functions
 - Geographic area of users
 - Culture/Work environment
 - Delivery constraints or special issues/concerns
- Helps target training materials to meet the specific needs of the training audience



Audience Analysis

User Groups	Audience Characteristics					
	# of People	Background	Job	Geography	Culture	Delivery Constraints



Performance Analysis

- The performance analysis identifies:
 - Target level of performance
 - Current level of performance
 - The gap between the target and current levels of performance



Performance Analysis

- Business goal (Domain)
 - Metrics of the goal (Measurable Criteria)
 - Task to achieve metric (Action)
 - Skills (Ability)
 - Knowledge (Content)
- What is needed to complete the task?
- Where is the audience today?



Performance Analysis

Measurable Criteria	Action	Ability	Content	Condition	Where the Audience is Today



Review of Day 1

- Overview of training development process
- Overview of Plan It phase
 - Roles and responsibilities
- Training Needs Analysis
 - Audience Analysis
 - Performance Analysis



Preview of Day 2

- Instructional Design Plan Working Session
 - What are learning objectives?
Statements that:
 - Describe the desired performance of a task
 - Describe results required to be considered “job ready”
 - Document the conditions needed to perform tasks
- Project Plan Working Session
- Next Steps



Happy Hour Location and Directions

- Capitol City Brewery
- **Capitol Hill**
2 Massachusetts Avenue, NE
(202) 842-BEER
- **Directions:**

The Capitol Hill location is located right across the street from Union Station in the historic Postal Square Building. It is a red line Metro stop.





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- Define roles, responsibilities and deliverable timelines
- Utilize standard templates and job aids to outline training design & development activities
- Gather feedback regarding the new training methodology and ease of templates/job aids use



Agenda

Time	Topic
9:00	Instructional Design Plan Working Session
	Learning Objectives
	Content Scope
	Delivery Strategy/ Instructional Strategy
	Logistics Strategy
	Project Plan Working Session
	Stakeholders and Communication
	Workplan (Tasks, Deliverable Schedule, Check-in Points)
	Task Order
3:00	Next Steps
	Next gatherings / meetings



Instructional Design Plan Working Session

- An instructional design plan is:
 - An outlined approach to training
 - Based on the training needs identified by the audience and performance analyses
- It includes an overview of:
 - Learning Objectives
 - Content Scope
 - Delivery Strategy / Instructional Strategy
 - Logistics Strategy



Learning Objectives

- What are learning objectives?

Statements that:

- Describe the desired performance of a task
- Describe results required to be considered “job ready”
- Document the conditions needed to perform tasks



Learning Objectives

Action/Performance	Condition	Criteria (Criterion)	Learning Objective



Content Scope

- The content scope outlines the knowledge and information included in the course modules
- Based on the domains and knowledge identified in the performance analysis
- Follows on learning objectives by considering what content will enhance outcomes



Content Scope

Course Objectives	Content Category	Concepts



Delivery Strategy/ Instructional Strategy

- Delivery strategy
 - The medium by which the instruction is presented
 - Formats may include:
 - Classroom, Instructor-led, Expert-led, Self-study, (CBT), CD, Video Conference, Business Simulation, Audio Conferencing, Web
- Instructional strategy
 - The method by which the skills and information are delivered
 - Formats may include:
 - Lecture, Demonstration, Workshop, Walkthrough, Exercise Simulation, Discussion, Case Study, Goal-Based Scenario, Game, Reading



Delivery Strategy/ Instructional Strategy

Factors	User Groups				
Audience					
Size of audience					
Geographic dispersion					
Performance					
Complexity of content					
Volume of content					
Complexity of tasks					
Stability of content and tasks					



Logistics Strategy

- The initial logistics strategy is a high-level plan which includes:
 - Number of events
 - Location of events
 - Number of participants per event
 - Delivery Support
 - Materials needed



Logistics Strategy

Number of Events	Location of Events	Number of Participants per Event	Delivery Support	Materials Needed



Project Plan Working Session

- The core management plan that includes:
 - Role map
 - Stakeholder analysis
 - Work plan
 - Tasks, deliverable schedule, check-in points



Stakeholder Analysis and Communication Plan

- The stakeholder analysis supports the successful delivery of training by identifying the internal and external stakeholders for the training project
- Stakeholders may include sponsors, supervisors, SME's, training developers, and the users



Stakeholder Analysis & Communication Plan

Stakeholders	Interest in Project			Communication Needs
	Understanding	Support	Influence	



Workplan

- Tasks
- Deliverable schedule
- Check-in points



Workplan

Deliver- able #	Deliverable	Responsibility	Due date	11/2	11/9	11/16	11/23	11/30	12/7	12/14	12/21	12/28	1/4	1/11	1/18	1/25	2/1	2/8	2/15	2/22	3/1	3/8	3/15	3/22	3/29



Task Order

- Task Order format



Review of Day 2

- Instructional Design Plan Working Session
 - Learning objectives
 - Content Scope
 - Delivery strategy / Instructional strategy
 - Logistics strategy
- Project Plan Working Session
 - Stakeholder analysis & communications plan
 - Workplan

[illegible]



Next Steps

- Schedule
 - Next gathering / conference call